2026 FGFOA E-Bulletin

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The FGFOA Free Internet Webinar Series Presents
Data Driven Finance
Thursday, August 20, 2026
2:00 p.m. – 3:40 p.m. EDT
CPE: 2 Hours TB
Field of Study: Finance - Technical

Presenters:
Dena Wilson, Data Strategist, Citrin Cooperman Advisors, LLC
Samson Truong, Data & AI SME, Citrin Cooperman Advisors, LLC

Overview:
Finance teams are under increasing pressure to move beyond historical reporting and deliver forward-looking, strategic insight quicker. This webinar explores how organizations can build a data-driven finance culture that enables smarter, faster decision-making and how analytics and AI fit into that journey. Central to that transformation is establishing a single source of truth that eliminates fragmented data, manual reconciliation, and reporting silos, alongside automating the movement of data from source systems into audit-ready, finance-grade outputs. Through practical frameworks and a live demonstration, attendees will learn how to modernize their finance analytics approach, strengthen data trust and auditability across the organization, and lay the groundwork for AI to amplify professional judgment.

Key Focus Areas:
- Defining Data-Driven Finance: What it means for finance teams to shift from hindsight to foresight, and why a unified, trustworthy data foundation is the starting point
- Importance of Data Culture: Why culture must come before tools, and how to identify and overcome common cultural barriers to analytics adoption
- Building a Single Source of Truth: How to consolidate fragmented data, automate ingestion and movement across source systems, and eliminate the manual reconciliation that slows reporting and audit cycles
- Foundation for Analytics and AI: Data quality, governance, and self-service enablement as prerequisites for effective and defensible AI adoption
- Finance Analytics Demo: A live walkthrough of analytics and AI capabilities applied to real use cases

Learning Objectives:
- Define data-driven finance and articulate how it differs from traditional approaches
- Identify the cultural and organizational barriers that prevent finance teams from adopting analytics and AI

- Describe what a single source of truth means and how automated data ingestion and movement reduce reporting lag and manual reconciliation effort
- Describe the foundational requirements for analytics and AI readiness, including data quality, governance, and self-service enablement
- Recognize high-value AI use cases in finance
- Apply a practical framework for moving finance analytics from descriptive to predictive and prescriptive insight

Webinar Registration

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